



USAID
FROM THE AMERICAN PEOPLE

ZAMBIA

Issue Date: January 11, 2010
Closing Date: January 29, 2010
Closing Time: 12:30PM, Zambian Time

SUBJECT: REQUEST FOR PROPOSAL (RFP) NO. 611-2010-03 USAID/ZAMBIA TEAM BUILDING RETREAT

Dear Sir/Madam:

The United States Government, represented by the United States Agency for International Development (USAID) in Zambia is hereby seeking proposals from interested parties in providing Facilitation Services to USAID/Zambia for Team Building Retreat that will be held at a venue in Lusaka, Zambia. The successful bidder will be awarded a fixed price purchase order for the deliverables described in the attached proposed statement of work. If accepted, this purchase order will require the contractor to complete and deliver the specified tasks and/or products(s) within the final negotiated price.

If you are interested, please provide me with your proposal for accomplishing this work at your earliest opportunity, but no later than Friday, January 29, 2010. Your proposal should contain three sections in the following format:

Cost Proposal consisting of:

Your analysis of and detailed proposal for accomplishing the proposed scope of work.
A detailed description of technical activities to be executed to achieve the results included in the previous point.
Your proposed time schedule for accomplishing the work.

The attached proposed Scope of Work outlines what USAID expects to be addressed during the assistance, however, future minor adjustments might be incorporated. The final Scope of Work will be included in the official Purchase Order.

I would appreciate being notified immediately if you are unable and/or not interested at this time in submitting a proposal for this work.

This letter in no way obligates USAID to award you a contract nor does it commit the U.S. Government to pay any cost incurred in the preparation and submission of the foregoing. Do not incur any expense or begin work until notified that a purchase order has been awarded, in writing, by the Executive Officer. Please refer any questions you may have to

Lucky Mwaka, via telephone at 260-211-254303/6 or via email at lmwaka@usaid.gov, or myself.

Yours truly,

Jeff Sharp
Executive Officer

Attachments:

1. [Scope of Work for Facilitation Services](#)
2. [Evaluation Criteria for team building retreat](#)
3. [General Instructions](#)

ATTACHMENT 1

USAID/Zambia Team Building Retreat

Scope of Work for Facilitation Services

Purpose:

To hire the services of a firm or individual to provide:

A facilitated office staff retreat (described below) including pre-retreat consultation/information gathering services with various teams within USAID; and
A report to the USAID Director and each Team Leader summarizing retreat and AO consultation results, outlining constraints and opportunities, and action-oriented recommendations for the short, medium, and long term.

The main purpose is to assist the United States Agency for International Development (USAID) to develop high performing teams to implement its development strategy in Zambia. The activities to be undertaken should be consistent with current USAID management and program development approaches, incorporating the Contractor's experience and lessons-learned in providing related assistance and training to other organizations, both within and outside the USAID-system.

Contractor will take an "Appreciative Inquiry"¹ (AI) approach to develop a two-day team building retreat for the staff at USAID/Zambia. Rather than taking a problem-solving approach and cataloguing the current weaknesses that need correction, the appreciative inquiry methodology searches for what is going right in an organization and exploring the potential for greatness. What lessons can staff learn from the exceptional performance that does occur?

The guiding principle of the AI methodology² is that a positive focus delivers a positive result. If one looks for problems, one will certainly find them. Organizational development strategies that concentrate on what is working poorly and aim to make improvements often never get past finding problems and pointing fingers, getting caught in a downward spiral of negativity.

¹ David Cooperrider and Suresh Srivastva at Case Western Reserve University best popularized Appreciative Inquiry in their 1987 article "Appreciative Inquiry into Organizational Life". AI is a process to find the best in people and organizations.

² The description of appreciative inquiry draws heavily from the following references:
<http://appreciativeinquiry.case.edu>; http://en.wikipedia.org/wiki/Appreciative_inquiry;
<http://hbswk.hbs.edu/archive/3684.html>; and <http://www.lifemasters.co.za>

Appreciative inquiry involves four stages: discover, dream, design, and destiny. Below is an example how USAID might start a team building exercise using the principles of AI.

Discover the "best of what is" - USAID staff identifies where the organization's processes worked perfectly.

Dream "what might be" - USAID staff envisions processes that would work perfectly all the time.

Design "what should be" - USAID staff designs and prioritizes the elements of perfect processes.

Create a Destiny based on "what will be" - USAID staff to participate in the creation of the design.

Background:

USAID/Zambia manages a complex program and is divided into technical teams in the areas of Economic Growth, Education, Population/Health/Nutrition, Democracy/Governance, HIV/AIDS, and Humanitarian Assistance. Zambia is a focus country under the President's Emergency Plan for AIDS Relief (PEPFAR) which has dramatically expanded resources and management responsibility. The FY 2009 Operating Year Budget is approximately \$265 million.

In order to address the development challenges faced by Zambians through USAID's programs, the USAID office in Zambia relies on a staff of 74, including 22 Americans and 52 Zambians with a wide range of experience and backgrounds from gardeners and janitors through PhDs and medical doctors. The six programmatic teams mentioned above, in addition to the Program Office, the Executive Office, and the Office of Acquisition and Assistance define USAID's structure. USAID is led by a Front Office consisting of the Director, Deputy Director, and Administrative Secretary.

Requirements:

GOAL:

The USAID office plans to stage a team building retreat with the twin goals of: fostering the development of a highly performing USAID-wide team with all teams working together towards our development goals, and fostering high performance, cohesion, and collaboration within teams.

TASK 1: Pre-Retreat Research and Interviews:

The first task is to gather information through individual interviews and meetings with teams in order to understand team dynamics and overall morale and team cohesion issues. The Contractor should spend time before the retreat conducting information-gathering exercises in the USAID office and with each team (through interviews, focus groups, etc.) to define more closely the retreat agenda. USAID will provide all information gathered in advance of

the retreat on issues related to job satisfaction and staff interests in defining the retreat agenda. Cost effective ways of getting confidential and personal feedback, such as internet-based surveys, are strongly encouraged. For up to four days, the facilitators will work with USAID management and each team to determine team-specific development needs. The week will conclude with a half-day meeting at USAID for the Senior Staff, including the Front Office, Team Leaders, and Deputy Team Leaders. The facilitators should use this half-day event to present their findings, work with the senior management team, and make recommendations on the content and structure of the full USAID retreat and teambuilding effort scheduled for the following week.

The Contractor should provide, in advance of the half-day meeting and the later two-day retreat, synthesized copies of reading materials on team building, effective teamwork, change management, and strategic planning for retreat participants. The Contractor, with USAID's input, will decide which materials to use and how many copies to make. USAID will provide materials on its strategic direction. The Contractor will share the proposed draft agenda for two-day retreat with USAID management one week in advance of the retreat. The agenda will include topics of interest to all staff raised during the pre-retreat interviews and information gathering.

TASK 2: Retreat:

The tentative date for the retreat has been set for mid to late February 2010. It will be conducted at a venue in or near Lusaka, Zambia, to be provided by USAID. The results of task #1 will further define how the objectives outlined in task #2 are best approached and achieved. In addition, completion of task #1 may raise additional discussion points and objectives to the ones listed below. The retreat will have as its main objectives:

- Define the characteristics of effective, high-performing teams and help develop a common understanding of the meaning of "teamwork";
- Team building in a multi-cultural workplace;
- Work with teams on managing change as it relates to changes in USAID organization/structure;
- Work with both the larger group and individual teams to define roles and responsibilities;
- and Develop a preliminary implementation calendar of how to improve overall USAID and team dynamics.

TASK 3: Follow up and Final Report:

The Contractor will spend a maximum of up to three days following the retreat working again with the teams to finalize the respective roles and functions to ensure effective implementation of team actions to improve performance.

The Contractor shall provide a final report, including a synthesis of issues raised, a synopsis of the retreat proceedings, and specific short, medium and long term recommendations to USAID in Microsoft Word format. In addition, the Contractor should

provide a summary report on the Senior Staff meeting that can be used to brief all employees.

Participants and Location:

Participants in the retreat will be the full range of employees at USAID/Zambia. The Contractor will need to confirm the number of participants with USAID management prior to making arrangements. USAID currently envisions the first half-day for up to 70 employees. Based on previous experience and the results of task #1, the Contractor will propose to USAID management if it makes sense to split into smaller groups for the remainder of the two-day retreat.

USAID/Zambia will determine the precise location of the retreat outside of Lusaka. USAID will sign a contract with an establishment to provide the food, lodging (if necessary), and conference facilities. The Contractor should liaise with USAID to find out what types of limited conference equipment will be made available (laptop, projector, flip charts, etc.)

Logistics

USAID/Zambia will contract directly for the off-site retreat location. The Contractor will be responsible for transporting its personnel to and within Zambia and will pay directly for accommodation, etc. for its personnel. The Contractor will provide background materials on team building. USAID will not be able to provide photocopying services, office space, and secretarial support while in Lusaka.

Reporting Requirements

The Contractor will work under the guidance and direction of the USAID/Zambia Director or his designee. The point of contact for all logistical matters will be the USAID's Executive Officer. The Contractor will work collaboratively with all Team Leaders.

Contractor Qualifications and Experience

USAID/Zambia requires the services of a firm with the following qualifications/experience:
At least five years relevant experience in facilitation of organizational and unit retreats;
At least three years experience in organizational development;
Previous experience and proven competence with the appreciative inquiry methodology;
and Previous experience working with USAID or other similar organizations in Africa.

Contractor should be able to provide at least two experienced retreat facilitators, one of whom should have experience working in an African context. Each facilitator should have a solid background in organizational development, strategic planning, and specific knowledge of how large organizations work in a multi-cultural environment. Specific knowledge and/or experience with USAID is preferred.

Estimated Level of Effort

Advance planning and preparation:	Not to exceed	5 person days
In-country preparation and half-day workshop	Not to exceed	10 person days
Retreat and follow-on activities	Not to exceed	10 person days
Report preparation and finalization	Not to exceed	5 person days
TOTAL	Not to exceed	30 person days

ATTACHMENT 2

SELECTION CRITERIA Usaid/Zambia Team Building Retreat

The evaluation criteria below are presented by major category, with relative order of importance, so that Offerors will know which areas require emphasis in the preparation of a submission. The criteria below reflect the requirements of this particular statement of work. Offerors should note that these criteria: (1) serve as the standard against which all proposals will be evaluated, and (2) serve to identify the significant matters, which Offerors should address in their proposals.

Skills and Qualifications (50 points total). The successful candidate will demonstrate the following competencies:

Positive references from previous customers indicating that contractor has facilitated successful organizational development retreats, seminars or courses (30 points)

Excellent English oral and written communication and presentation skills, reflecting an ability to analyze and report to a wide audience on technical issues. (20 points)

Employment Experience (50 points total).

At least (10) years documented experience in organizational development, strategic planning and specific knowledge of how large organizations work in a multi-cultural environment. Specific knowledge and/or experience with USAID is preferred. (40 points)

Proposed schedule is flexible and meets the needs and accommodates the constraints of all USAID staff and team leaders. (10 points)

ATTACHMENT 3 GENERAL INSTRUCTIONS TO OFFERORS

Interested candidates must submit a proposal for the USAID/Zambia Team Building Retreat activities. Submission must be written in English and typed with each page numbered consecutively.

Interested offerors may submit the proposal:

Electronically – internet email with attachments (2MB limit) compatible with MS WORD, MS Excel, in facsimile. (Facsimile of the entire proposal is not authorized);

To: jsharp@usaid.gov, cc to lmwaka@usaid.gov

Via regular mail – sending paper quotation. All mail is subject to US Embassy electronic imagery scanning methods, physical inspection, and is not date and time stamped prior to receipt by USAID and the Executive Officer; or hand delivery (including commercial courier) to the following address:

Jeff Sharp
Executive Officer
USAID/Zambia
Plot # 351 Independence Avenue, Woodlands
P.O. Box 32481
Lusaka, Zambia

Government Obligation

The US Government is not obligated to make an award or to pay for any costs incurred by the offeror in preparation of a submission in response hereto